

20 February 1986

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NOTE FOR:

FROM:

SSA/DDA

SUBJECT: Checksheets for Tax Implications

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1. Meet [redacted] What I would like to do is this: I am not recommending that any models or checksheets go into the WWSB which we are now sending out.

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2. At this juncture, I only want you and [redacted] to examine the feasibility of designing out a simplified checksheet perhaps for eventual use, whereby Agency employees, either CIARDS or Civil Service, could plug in their own numbers and get an approximate estimate of the tax implications under the "three-year rule" compared to the "general rule." I recognize fully how imprecise these results will be but efforts to have such a checksheet for the people overseas may be worth our doing. We would have to fully explain that in no way can such an approach be completely accurate. It is only to be used as a guideline for one's own personal planning strategy.

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*Let's try it.*